



Bruce Trail
CONSERVANCY



The Bruce Trail Conservancy

Succession Planning Toolkit

2014

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1. Definition

Succession planning is a series of deliberate and planned actions that will improve your odds of attracting and retaining volunteers for your Board. Succession planning is important to avoid knowledge gaps.

2. First Steps

1. Identify key positions (critical, cannot be vacant for your Board to function effectively) and upcoming vacancies (terms that are up)
2. Identify key people (new or existing volunteers and Board members who have skills/abilities and a willingness to serve)
3. Match up the two where possible
4. Where there are “holes” take action

3. Getting Started

Ensure someone on your Board is responsible for leading this activity (typically your Past President) or it won't happen.

Take a long view and be proactive...start the process early (not a few weeks before your AGM) and recognize that people may have to start with smaller contributions (like serving on a Committee) before they are ready, willing and able to step into a Board position.

Ensure you create an atmosphere that people want to be part of...maintain confidentiality of issues, be welcoming (not a clique), do not broadcast small, solvable problems so that potential volunteers get scared off, etc.

4. Identify Future Leaders

Recognize your current leaders often.

Promote being part of a winning team.

Monitor meeting attendance and committee participation.

Be aware of Members with “Can Do” attitudes - Spend time at events/hikes talking to people to get to know them and where their interests lie (these names should then be passed along to the Board member responsible for compiling potential candidates).

Maintain a Potential Leaders list - Check in with the Club Volunteer Coordinator. A line has been added to all volunteer forms regarding interest in Leadership Positions.

Work to instill a sense of responsibility among your current Board members that they should share the load of identifying and grooming potential replacements for themselves as they get ready to vacate their current position.

Consider that some people will want to volunteer for activities closely related to their “work lives” (like accountants for the Treasurer’s position) and others will want to try something totally different...give people options.

Ask people more than once. Sometimes it can take a few times before a person says yes.

Open Board meetings to members and extend personal invitations to meetings.

5. Training

Start small – assign small tasks or one-time projects. Delegate responsibilities to different Board members.

Help get new Board Members started on the right foot – invite them to a Board meeting before they start their term. Provide an orientation to the Club. Give them the Volunteer Orientation Manual.

Help get new Board Members acclimated – ask current or past Board members to be a mentor to new members, and to sit beside them at their first few meetings. Mentors should spend time with new members after the meeting to explain anything that may have been missed by the new Board member.

6. Potential Problems

- The gatekeeper – one person holds all the knowledge within a system only they understand.
- Believing someone is irreplaceable – thinking that some volunteers cannot be replaced.
- Seniors take all – senior volunteers taking all the administrative responsibility, thereby restricting the development of new volunteers. Make sure new volunteers are provided with opportunities to develop and learn.

- Time to go – committee members who have served the organization well for many years, but now may be reaching the end of their effectiveness.
- Fear of change – a fear of change culture within the organization, wanting everything to stay the same.

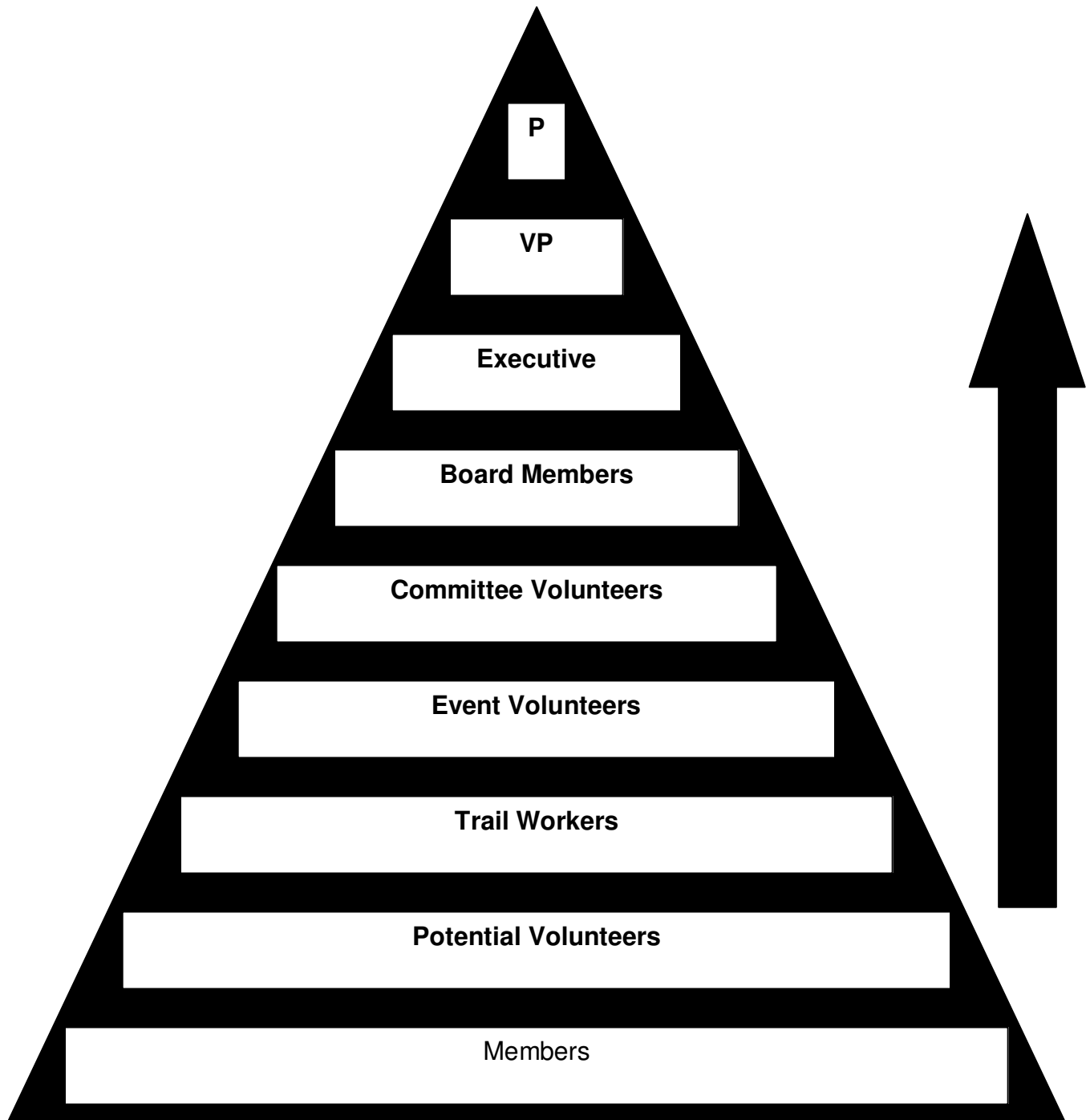
7. Succession Planning that Works

- Matching new Trail Captains with more experienced Trail Captains
- Splitting the role of the Trail Director into 2 or more positions.
- Building Committees around positions that have a lot of responsibility.
- Ensuring that all Committee Chairs and Executive Members are thinking about their replacement when they are planning on stepping down from the role.
- Advertising on websites and in newsletters for new volunteers to fill important positions.
- Make it known that you are actively recruiting to fill certain roles. Make announcements on organized hikes, work parties and at events.
- Have a volunteer signup sheet at all events, list positions that need to be filled.
- Ensure all hike leaders carry some volunteer brochures.
- Word of mouth is the most effective way to get new volunteers.
- Check out your local Volunteer Centre and post available positions.
- Invite all Past Presidents to a lunch and pick their brains for candidates and good ideas.
- Create At-Large positions on your Club Board, so that people can ease into a Board role without being scared off.

APPENDICIES

Succession Planning Pyramid

The amount of people decreases as the pyramid narrows. It is important to keep more people coming in the bottom of the pyramid to ensure the top positions are filled.



Succession Planning Questionnaire

Distribute this questionnaire to your current Board.

This questionnaire will help us understand your leadership goals.

Name: _____

Current volunteer position held: _____

Years in position: _____

We would like to know what position(s) you would be interested in holding. This need not be limited to open positions. You may also list more than one position.

We would also like to start creating a succession plan for the next 3 years. Please share any goals that you have for future leadership positions.

Whether or not you plan to vacate your current position next year, we would like your ideas for your successor. If you plan to serve again next year in your current position, who could you start mentoring for this position in the future?

What other committed, responsible, fun individuals should we be talking to about serving on the board? Please list anyone that you think would be a good addition:

Volunteer Centres – check websites for most recent information

Central Ontario	South Western Ontario
<p>Volunteer Centre of Halton 860 Harrington Court, Suite 209 Burlington, ON L7N 3N4 Tel: (905) 878-0955 Fax: (905) 632-0778 acoburn@cdhalton.ca www.volunteerhalton.ca</p>	<p>Volunteer Centre of Hamilton & District 267 King St East Hamilton, ON L8N 1B9 Tel: (905) 523-4444 Fax: (905) 523-7465 info@volunteerhamilton.on.ca www.volunteerhamilton.on.ca</p>
<p>The Volunteer Centre of Owen Sound/Grey/ Bruce 1350-16th Street East Owen Sound, ON N4K 6N7 Tel: (519) 371-7448 Fax: (519) 371-8225 volunteer@bmts.com</p>	<p>Dufferin Volunteer Centre RR #4, Mono Place Orangeville, ON L9W 2Z1 Tel: (519) 941-2432 Fax: (519) 941-0492 info@volunteerdufferin.ca www.volunteerdufferin.ca</p>
Volunteer Toronto	Volunteer, Mississauga, Brampton, Caledon
<p>Volunteer Centre of Toronto 344 Bloor Street West, Suite 404 Toronto, ON M5S 3A7 Tel: (416) 961-6888 Fax: (416) 961-6859 info@volunteertoronto.on.ca www.volunteertoronto.on.ca</p>	<p>Volunteer MBC - Brampton Centre c/o Community Door Brampton 7700 Hurontario Street, Unit 601 Brampton, ON L6Y 4M3 Volunteer MBC - Mississauga Centre c/o Family Services of Peel 151 City Centre Drive, Unit 501 Mississauga, ON L5B 1M7 Volunteer MBC - Caledon Centre c/o Albion Bolton Branch of Caledon Public Library 150 Queen Street South Bolton, ON L7E 1E3 www.volunteermbc.org</p>

Resources for Recruitment of Volunteers

Board Match www.altruvest.org/boardmatch/content/home.aspx

BoardMatch® Fundamentals helps place knowledgeable and enthusiastic volunteers on the Boards of Directors of charitable organizations.

In the Greater Toronto Area, these organizations only include registered charities.

BoardMatch Fundamentals has placed over 2,400 talented board members on the boards of over 650 charitable/non-for-profit organizations. Our participating organizations range in size and scope and include Big Brothers and Sisters, Boys & Girls Clubs, The Canadian Cancer Society, Habitat for Humanity, local United Ways, and Volunteer Centres. This program is presently available in Calgary, Fredericton, Greater Toronto Area, Greater Vancouver and Thunder Bay.

Charity Village www.charityvillage.com/cvnet/volunteer.aspx

List your volunteer opportunities for free on the Charity Village website

Volunteer Centres <http://volunteer.ca/i-want-volunteer/find-volunteer-centre/ontario>

This is a full listing of volunteer centres in Ontario. You can place postings at centres near you.

Certified Management Accountants www.cma-ontario.org/index.cfm/ci_id/7842/la_id/1.htm

Searching for a CMA to volunteer in your organization?

Certified Management Accountants (CMAs) have a proud history of volunteerism in communities and organizations across Ontario. They add value through the depth and breadth of their strategic, management and accounting expertise. A large percentage of the CMA Ontario membership base work outside traditional accounting roles which provides greater insight and perspective to help grow and develop your organization.

CMAs are highly qualified to serve not-for-profit and charitable organizations in positions such as:

- Board Member
- Committee Member
- Treasurer
- Event Coordinator
- Fundraising Coordinator
- Financial Consultant

Organizations and leaders of committees are encouraged to utilize this free and powerful resource to set up an organization profile on the **CMA Ontario Volunteer Matching Website**.

Once your organization profile is active you will have access to create, manage and update your organization's Volunteer Opportunities. Interested CMAs will apply directly through the website, giving you the option to view and select the best match for your volunteer position.

Koodonation www.koodonation.com

At Koodonation, little actions can make a big difference.

We're an online hub that connects **volunteers** with **non-profits** through microvolunteering. You just simply give your time when you have it, whether it's a little or a lot, and we'll match your skills and interests with the needs of non-profits. Together, we'll help complete these online challenges and make a big difference in the community.

Get Involved www.getinvolved.ca

A networking website that hooks up Canadian volunteers with not-for-profits in need.

Good Work! www.planetfriendly.net/goodworksubmit.html

Post to a daily e-mailing to over 2,000 people seeking opportunities in environment, sustainable living, organics, food issues, peace and human rights.

Local Colleges and Universities Contact Information

College/University	Campus	Contact	Web Info
Georgian College	Main Campus, Barrie	Phone: 705 722 1511	www.georgian.on.ca
Georgian College	Collingwood, Human Resources Program	Phone: 705 445 2961 Fax: 705 445 1218 Kim Saunders	www.georgian.on.ca/collingwood
Georgian College	Owen Sound, Human Resources	Phone: 519 376 0840 Fax: 519 376 5395	www.georgian.on.ca/owen-sound
Georgian College	Midland, Fund Raising Program	Phone: 705 526 3666	www.georgian.on.ca/midland
Georgian College	Orangeville	Phone: 519 940 0666 Fax: 519 941 0905	www.georgian.on.ca/orangeville

Mohawk College	Hamilton, Volunteer Management Program, Fundraising Program	Phone: 905 575 2404 Pat McDonald	www.mohawkc.on.ca
Niagara College	Welland, Human Resources, Special Event Mngt	Phone: 905 735 2211	www.niagara.on.ca
McMaster University	Hamilton, Human Resources Program	Phone: 905 525 9140	www.mcmaster.ca
Brock University	St Catharines	Phone: 905 688 5550	www.brocku.ca
Guelph University	Guelph	Phone: 519 824 4120	www.uoguelph.ca
Toronto University	Toronto	Phone: 416 978 2011	www.utoronto.ca
Sheridan College	Mississauga, Fundraising, web design, media	Phone: 905 845 9430	www.sheridancollege.ca